E-PCS
Quick tour

A screen by screen overview guide to the
Electronic Proposal Clearance System

Office of Research Services and Administration
University of Oregon

This slideshow is an overview of the features and capabilities of the Electronic Proposal Clearance System. It addresses entering and customizing the system, navigation, and explores some of the basic functions.

It does not address content issues. For help with content issues, please refer to the full User Manual

Quicktour instructions

- Close this window to exit the tour, you will be returned to the E-PCS system
- This Quicktour is <u>not comprehensive</u>. Read the User Manual for complete information.
- Click a subject in the left pane to advance from slide to slide or use the arrows below

This slide show was optimized for Netscape version 4 or higher. If you are able to use Internet Explorer version 6 or higher, you will be able to resize the frames.
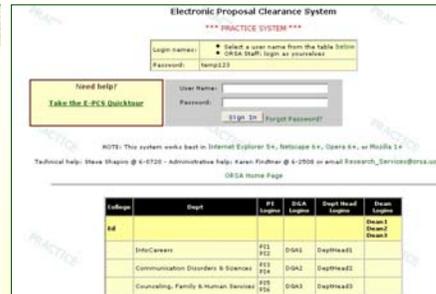
Enter your user name and password.

If this is your first time logging in, use the User Name and Password sent to you by ORSA. If you need help with a first time login, use the second link of the help section.

If you have forgotten your password, click on the "Forgot Password" link.

If you have forgotten both your user name and password, please contact ORSA's Technical support @ 6-5131.

The "Take the E-PCS Quicktour" link in the help box leads to this slideshow.

Using the practice system, you can simulate any of the roles within E-PCS. Depending on your role, some buttons and fields may or may not be available. Using the practice system, you can simulate the proposal process from creation to final approval.
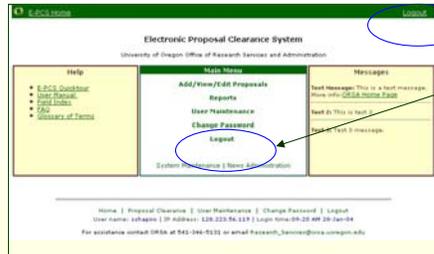
You can log out from any screen within E-PCS. For security reasons, it is important to remember to log out before shutting down your browser. If you do not log out, somebody can sit down at your computer, start up your browser and possibly be able to log into your session.

It is always a good idea to log out from any secure connection, such as banking applications and E-PCS, and then shut down and restart your browser before surfing to other pages.

The main E-PCS menu. From here you can access your proposals, run reports, change your user name and e-mail preferences, change your password, or logout. The second row shows that we are recording your user name, your computer's IP address and the last time you logged in.

The very last line tells you how to contact our office if you have trouble, and is available on every screen of the system.

On the User Maintenance screen, you can change your User Name (yes, it can have spaces) and E-PCS specific system information. All of the other information is derived from your Human Resources entry in Banner. If it is not correct, it must be changed in Banner.

If you do not anticipate using the system from off campus, please leave the "Restrict access" setting as "Yes."

The other checkboxes enable you to control how much e-mail you will receive as your proposal goes through the approval process. PIs and DGAs will always be notified immediately if anyone declines to approve a proposal they are involved in.

Information can not be changed in the practice system.

Proposal Menu

Add New Proposals

Status Key

Clickable links to proposals

Grant Number, if known

Use search function to filter the list

Your role on each proposal

More proposals, if any

Here you can add new proposals and templates; and edit proposals currently in progress. The proposal numbers are the links to your proposals.
You will only be able to see proposals that you are affiliated with.

Proposals will remain available indefinitely, if you find that you have too many proposals on your menu, use the search criteria to reduce the number of visible choices.

Proposals that were created before the E-PCS system became available can be accessed by clicking the 'View Old PPS Information' link. The exact date will be specified on the web site.

You can specify a variety of criteria to search for proposals in progress: The proposal number, the PI's name; how recently it was created, or whether it is in progress or finalized.

Principal Investigators may add new proposals only with themselves as the PI. Grant administrators can choose which PI will be leading the project.

You must also select the unit that is submitting the proposal and what type of application this is (new, renewal, continuation, etc).

If a unit or PI is not listed in the pull down choices, stop and call ORSA immediately.

You can create templates containing information that tends to repeat over numerous proposals.

When it's time to start a new proposal, add it using the data in the template to avoid having to reenter the information by hand. You can create as many templates as you like. Templates can not be shared between different users.

Proposal Screen Areas

1. Header area: Identifies the Proposal Number, PI and title of the proposal

2. Utility Buttons: Hovering the mouse over the buttons on the screen will pop up an explanation box on most browsers (if javascript is enabled). These buttons will be different depending on your role in the proposal

   - Check Proposal: checks to confirm that required fields are filled in

   - Approve: Give your approval that the proposal is OK to submit. Your password is required to approve or decline to approve a proposal.

   - Notes: Create and read notes to yourself or other people about the proposal

   - Print/View: Create one long page for the proposal that can be viewed or printed

   - Copy: Create a new proposal based on this proposal

   - Delete: Marks the proposal as deleted. Users will no longer be able to access the proposal. If you need it back, contact ORSA

   - Help Section: Several different types of help are always available

   - Exit: Back to main E-PCS menu

3. Tabs: Each tab represents a proposal section (4) containing fields for you to enter. Hitting a tab will show that screen.

4. Main Area: The main data entry area for each tab.

?: Click for context sensitive help

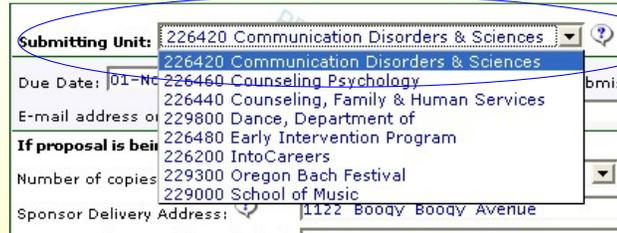Envelope: Open an e-mail link to the person

Magnifying Glass: Open person's information profile

Red Dot: this field is required before you will be able to finalize

Person: will popup a list of delegates for the approver

Note: Notes added by person who approved or declined to approve the proposal

Pulldowns

Submitting Unit:	226420 Communication Disorders & Sciences

226420 Communication Disorders & Sciences
226460 Counseling Psychology
226440 Counseling, Family & Human Services
229800 Dance, Department of
226480 Early Intervention Program
226200 IntoCareers
229300 Oregon Bach Festival
229000 School of Music

Due Date: 01-Nc

E-mail address o

If proposal is bei

Number of copies

Sponsor Delivery Address: 1122 Boogy Boogy Avenue

You may only select from the choices listed in the pull down boxes. If you need to enter something that is not available, contact ORSA.

In the special cases of Funding Agency and Key Personnel, if the choice is not listed, you may select the See Below or Not Listed option and enter the information in the text box provided.

Uploading files

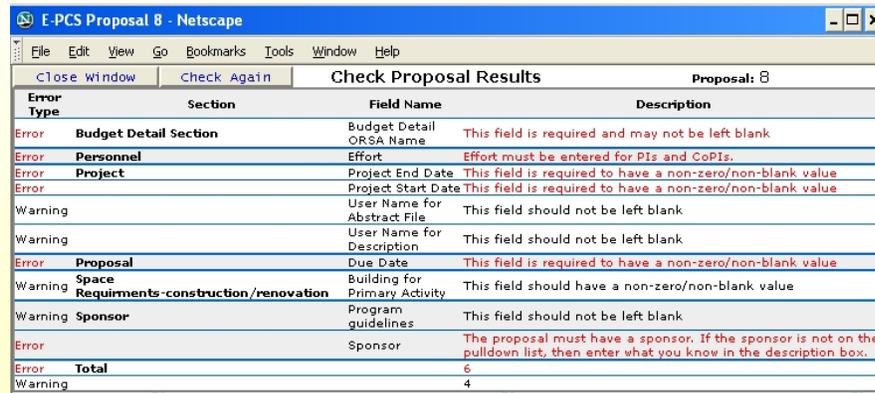You can upload files from your workstation or network disk drive.

Macintosh and other non-windows users should append file type extensions to the names of files being uploaded.

Once you've uploaded a file, you can view it by clicking the 'View' link.

If you wish to change the uploaded file, you must make changes in your local copy and then upload the new version.

If available, we recommend that you upload PDF documents, so that they can be viewed on a variety of computer platforms.

Checking a Proposal

You may Check a proposal at any time. The check procedure will reveal if any required fields are not filled in. In addition, some simple data checking is performed to validate your data (example: a start date must be prior to an end date).

Errors will prevent the proposal from finalizing. Warnings are for your information, and will not stop finalization.

You can leave the window open while you make corrections, and recheck as necessary.

Checking a proposal can take up to a minute to respond - please be patient.

After a proposal has been finalized, the only thing that can be changed are the approvers. You may not change anything else (note: the save buttons will not be on the screen).

If you must change an proposal after finalizing it, you will have to use the Revise/Replace option of the "Copy Proposal" function. You will have to go through the approval process again.

Copying will duplicate all of the information on a proposal (except approvals and key personnel) to a new record. You will have to specify the application type of the copied proposal, so it can be correctly linked to the existing proposal.

Prior to finalizing a proposal, it can only be copied.

After it is finalized, it can be Copied, Replaced or Revised.

Replacements and revisions are cross-linked with their original records, meaning that there will be a clickable link created so you can quickly navigate between the records.
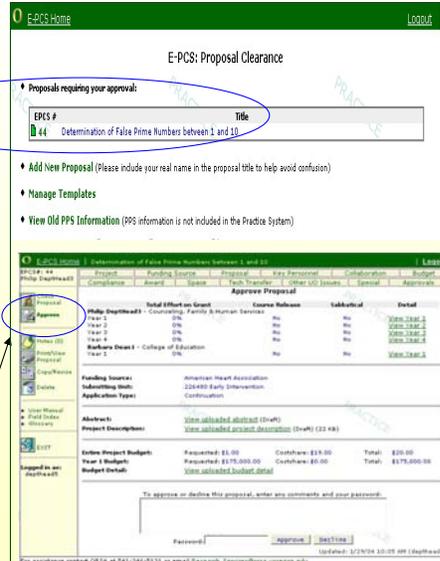
Approving a Proposal

An approver will see proposal(s) waiting for approval at the top of their menu

When the approver clicks the link in their e-mail or on the top of their menu, the system will direct them automatically to a summary page.

The summary page lists key points of the proposal.

The approver may also click any tab to view detailed information. When ready to approve or decline, clicking the "Approve" icon will return them to the summary page.

If you are the PI, CoPI, unit head, or other person with approval responsibility, you will receive an e-mail from Research Services indicating that a proposal is ready for your review. A hot link to the proposal is included in the e-mail.

After you are satisfied as to the contents of the proposal, click the Approve button. You will be required to then enter your password prior to Approving or Declining the proposal. The PI and DGA will receive immediate notification if the approval is declined.

End of Quicktour

- E-PCS has many more features not covered in the Quicktour. Please check all of the links and buttons in the practice system to see what they do

- If you have any additional questions that are not addressed here or in the User Manual, please contact our office for help

- Screen prints are helpful so we can see what you were looking at when you experienced problems

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